

## ***Appendix F: Functional Requirements: Enterprise Search***

Enterprise Search technologies use one search system across an organization, no matter what the technology platform. Enterprise search solutions are designed to search and index multiple repositories across different technologies to maximize the scope of the search through a single interface. The best enterprise search solutions also maintain the profile of the user's security across the different servers and domains, because there will always be certain information that some people are not meant to see.

### **GENERAL QUESTIONS** *(If possible, please limit responses to one page or less.)*

- A. Briefly describe your federated search capabilities. In addition to searching the core ECM repositories, the AOC requires a search tool that may include results from file servers, the web, e-mail, enterprise application data and reports, and records within databases. Explain which data stores are covered by your search engine "out of the box" and which may require integration or other workarounds.
- B. Where necessary or desirable can this search capability be tailored to limit the areas of the ECM which are searched? Can this limitation be modified by the administrator or end-user as needed?
- C. Briefly describe product differentiators in the area of enterprise search. Why is your solution the "right" solution for the California AOC, Courts of Appeal and Supreme Court?

## DETAILED REQUIREMENTS

### Response Key:

|   |  |
|---|--|
| 1 | Item is "Out Of Box"- indicate module  |
| 2 | Item will be included in future release - specify version and date             |
| 3 | Item addressed by 3rd party integration- specify partner                       |
| 4 | Item requires customized code to be written- estimate level of effort and cost |
| 5 | Item not addressed by solution   |

### F1. Enterprise Search

| ITEM | REQUIREMENT   | RESPONSE | COMMENTS |
|------|---|----------|----------|
| F1.1 | System shall support federated search of multiple sources, including file servers, web, e-mail, enterprise application data and reports, records within databases and the content management system.                  |          |          |
| F1.2 | System shall have the ability to control access to items of content from search and/or site map indexing based on AOC business rules or security roles (i.e. users shall only see results to which they have access). |          |          |
| F1.3 | System shall have the ability to integrate simple and advanced search screens and result screens into the user interface.   |          |          |
| F1.4 | System shall control the discoverability of content items by external search engines.   |          |          |
| F1.5 | System shall have the ability to generate a plain English URL for key web pages for easy referencing by non-technical end users and search engines.   |          |          |
| F1.6 | System shall have the ability to interface with thesauri or allow import of thesauri data into search engine thesaurus for browsing, selection and searching.   |          |          |

| ITEM  | REQUIREMENT  | RESPONSE | COMMENTS |
|-------|--|----------|----------|
| F1.7  | System shall provide a soundex (sounds like) capability in the thesaurus function so that misspelled terms can be related to their correct spelling.   |          |          |
| F1.8  | System shall provide comprehensive search facilities across the entire website, multiple sites or sub sites to support content publishing.   |          |          |
| F1.9  | System shall retrieve results in a timely fashion: goal is to ensure that tool adoption will not be negatively impacted by the speed at which it returns results.  |          |          |
| F1.10 | System shall support “pre-processing” of all search terms against the thesauri and automatically include related terms in the search.  |          |          |
| F1.11 | System shall have the ability to query and retrieve standard metadata.   |          |          |
| F1.12 | System shall support automatic indexing, keyword generation, and full-text indexing.   |          |          |
| F1.13 | System shall support comprehensive external search facilities across the entire website, multiple sites or sub sites for end users.  |          |          |
| F1.14 | System shall support key word and metadata search.   |          |          |
| F1.15 | System shall support multilingual search.  |          |          |
| F1.16 | System shall support separate indexing of content items for each supported website.  |          |          |
| F1.17 | System shall support the automatic modification of search results based on site usage and search patterns (e.g. weighting the most popular sites/search results selected by the user to appear high in the search results list). |          |          |

| ITEM  | REQUIREMENT  | RESPONSE | COMMENTS |
|-------|--|----------|----------|
| F1.18 | System shall support the measurement of the use/effectiveness of each keyword search query entered by a user in searching the website. This capability may be provided by a third party web metrics facility.  |          |          |
| F1.19 | System shall support natural language search interaction   |          |          |
| F1.20 | System shall support case independent search   |          |          |
| F1.21 | Systems shall conduct present partial matches (2 words out of more) after exact matches and occurs-in-page matches   |          |          |
| F1.22 | Support the use of Boolean operators (and; or; not) and proximity operators (near; with) to refine searches and accept phrases for full-text searches.   |          |          |
| F1.23 | System shall provide the ability for the CMS to control display of and access to items of content from search and/or site map indexing based on AOC business rules or security roles (i.e. users only see results to which they have access)                         |          |          |
| F1.24 | System shall provide the ability to search by learning object or learning object type  |          |          |
| F1.25 | System shall support indexing of text and common attachments (including Microsoft Office documents, Adobe PDF, etc.) within the CMS and across a number of repository types such as file systems and databases. Detail any formats not supported by system indexing. |          |          |
| F1.26 | System shall support search across library catalogues, including the InMagic library catalog and Innovative library catalogue.   |          |          |
| F1.27 | System shall support search and replace - mass <u>change</u> of learning   |          |          |

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|-------|--|----------|----------|
|       | objects, and <u>enable users to review and confirm the mass change before execution.</u>   |          |          |
| F1.28 | System shall allow end user to create and save searches.   |          |          |
| F1.29 | Systems shall provide a user interface to allow users to customize the sources included in a given search scope.   |          |          |
| F1.30 | System shall support highlighting of search terms within a result set or document.   |          |          |
| F1.31 | Systems shall provide control parameters that allow the administrator to control connection performance to content so that, for instance, a live Web server indexing can be throttled back so that indexing does not crash the server (but a file server may have a different control setting which allows for potentially faster retrieval during indexing, depending on network connectivity.) |          |          |
| F1.32 | Systems shall provide configurable search indexing schedules to allow administrators to set indexing at various times so they do not conflict with scheduled downtime of servers (for nightly backups).  |          |          |
| F1.33 | System shall provide reporting features to enhance search engine results sets and design.  |          |          |

*END OF APPENDIX*